

DOE ARRA Amended Local Plan – Cover Page

Due Date **October 30, 2009**

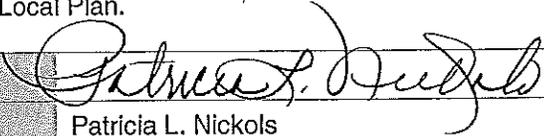
Email To **localplan@csd.ca.gov**

Contact for Questions

Agency Name	Community Action Partnership of San Bernardino County
Contact Person	John Newcomb
Title	EEES Program Manager III
Phone Number	909-723-1622
Email	<u>jnewc@capsbc.sbcounty.gov</u>

Participation Acceptance

Our agency is interested in participating in the DOE ARRA Program. We certify that we have the capacity to provide the required services within our service territory as outlined in the Local Plan.

Signature	
Name	Patricia L. Nickols
Title	Chief Executive Officer
Phone Number	909-723-1514
Email	<u>plnickols@capsbc.sbcounty.gov</u>
Date	October 30, 2009

CSD Approval

Approved by	
Approval Date	

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DOE ARRA Amended Local Plan

Instructions

It is important to first read the DOE ARRA Local Plan Instructions provided as a separate document before completing this plan.

General Plan

Describe your current progress towards your local plan goals and ramp-up to increase capacity and outreach in anticipation of receiving the DOE ARRA Production contract.

In responding to increased funding from LIHEAP, CAPSBC has added additional personnel in the job classifications of Outreach, Weatherization Technician, Quality Control Technician, Field Supervisor and clerical support. We have increased the vehicle fleet by refurbishing older vehicles and using them locally until we are able to secure new vehicles. We will also vehicles in order to expand the fleet. CAPSBC launched the San Bernardino Weatherization Training Center in August 2008. The Training Center is being utilized to train new employees and also provide refresher and advanced training to our existing workforce. All clients who attend our HEAP Workshops are required to sign up for Weatherization services. The agency website, CAPSBC.org, contains a comprehensive overview of the Weatherization program, along with detailed information on other CAPSBC programs. Visitors will find a downloadable version of all program application forms that they can print and complete when convenient.

For DOE ARRA, CAPSBC will follow the same steps to add personnel in the critical job classifications of Outreach and Technician. We are already making preparations to add to the vehicle fleet, and the Training Center is the critical asset in place to prepare the workforce. The capacity of the Training Center has been expanded by adding concurrent training sessions.

In reviewing the amount of your allocation, will you be able to build capacity enough to accept and spend the total amount for your entire service area?	Yes
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If not, what % of the allocation can you accept?	N/A
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For multi-county agencies, will you have the capacity to spend funds proportionate to each county's allocation and meet the 50% threshold in each county by the required deadline?	N/A
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Outreach to Potential Clients

Describe how you will increase your outreach efforts to reach the necessary number of low-income clients needed to meet your ARRA production goals. If you are a multi-county agency, describe how this will be accomplished in each county.

CAPSBC is currently exploring additional ways of reaching those who may qualify for the program. We will add Outreach Staff for this program, and increase marketing efforts in targeted low income areas by networking with community- and faith-based organizations. CAPSBC will promote "the Greening of San Bernardino County" in community newspapers, on local radio and cable TV, in community grocery stores and other places people congregate. "Green your Home" signs are posted in Omnitrans buses to advertise the program on selected routes throughout the county. A link with up-to-date information has been included on the agency's website. CAPSBC has also invested in the

California/Nevada Community Action Partnership "Fulfilling the Promise" video project and is planning to tape a segment in that series in November or December. CBS-TV will air the video segments, and they will be available on DVD for distribution and posted at the CAPSBC web site (www.capsbc.org.)

Identify the main Action Steps required to achieve the goals above utilizing specifics such as timelines, potential partners, marketing plans, etc...
Once a fully executed contract is received from State CSD, CAPSBC will immediately utilize the most experienced personnel to work in the ARRA program, and hire additional personnel. The agency will hire and train new employees and use them in the other contracts, ensuring ARRA has the most qualified employees performing all task associated with ARRA.

Detail progress made in this arena with respect to actual, tangible achievements. Be specific with regards to dates, details, and participants.
In June 2009, the County of San Bernardino Transitional Assistance Department mailed over 10,000 flyers to their client base on behalf of the CAPSBC Weatherization Assistance Program. The flyers had a tear-off form that interested parties could return to the agency to arrange an appointment with a CAPSBC Outreach Worker. By August, this mailing produced 3,000 leads, which Outreach Workers are now qualifying for Weatherization Services.

Also in June 2009, CAPSBC recorded two cable TV programs. The first was Time-Warner Cable's Headline News Local Edition, a 5-minute interview which airs several times a day on local cable networks for three consecutive months. The other was the City of San Bernardino Public Access cable program "Inland Empire Live." The bulk of the 30-minute program was devoted to CAPSBC services, with an emphasis on Weatherization Assistance. "Inland Empire Live" will be shown several times over a three month period. Both activities have increased exposure of this program in the communities CAPSBC serves.

**Outreach to
Elected
Officials**

Describe how you will increase your outreach efforts to educate, and possibly partner with, your local elected officials. If you are a multi-county agency, describe how this will be accomplished in each county.

CAPSBC has close working relationships with several local elected officials, including U.S. Representative Joe Baca and California Assembly Member Wilmer Amina Carter, both of whom are represented on the Community Action Board of Directors, San Bernardino County Supervisor Josie Gonzales, a past Board Member, and San Bernardino City Mayor Patrick Morris. CAPSBC maintains a prominent presence in many community events sponsored by the various leaders, and shares program information to keep the local elected officials informed about CAPSBC activities. CAPSBC also co-sponsors "Sustainable 62nd Assembly District," a comprehensive information package developed to inform residents of the 62nd Assembly District of programs and services that are available for the public.

Identify the main Action Steps required to achieve the goals above utilizing specifics such as timelines, contact people, etc...

CAPSBC prepares presentations on agency products and services to present to a variety of audiences. To promote this program, CAPSBC will prepare a presentation for City Council meetings around the county, and arrange to attend a minimum of two (2) City/Town Council meetings per month.

Tentative Schedule:

November 2009: San Bernardino, Colton and Rialto

December 2009: Hesperia, Montclair and Redlands

January 2010: Barstow and Twenty-nine Palms

February 2010: Fontana and Ontario

March 2010: Victorville and Chino

Detail progress made in this arena with respect to actual, tangible achievements. Be specific with regards to dates, details, and participants.

August 15, 2009, CAPSBC participated in the Community Health Fair, sponsored by the Mayor and Common Council of the City of San Bernardino.

Assemblymember Carter and Supervisor Gonzales also participated. Hundreds of "Green Your Home" flyers and CAPSBC program pamphlets were issued, and CAPSBC continuously fields calls of inquiry about Weatherization services.

Additionally, CAPSBC participates in the Foreclosure Prevention Seminars, sponsored by the Inland Empire Economic Recovery Corporation and the San Bernardino County Board of Supervisors. The Foreclosure Prevention Seminars target homeowners in each supervisorial district who are in danger of losing their homes. CAPSBC staffs informational booths and provides literature about available services, particularly the Weatherization Assistance Program. The most recent round of seminars were conducted 3/28/09 in Fontana, CA; 4/11/09 in Victorville, CA; 5/30/09 in Rialto, CA; 6/27/09 in Chino, CA; and 7/25/09 in San Bernardino, CA. The next Seminar will be held on 10/29/09 in San Bernardino, CA. CAPSBC will continue to support these seminars when a new schedule is published.

Outreach to Potential Partners and Community

Describe how you will increase your outreach efforts to educate and inform the community at large and create an environment that fosters partnerships in your local community. If you are a multi-county agency, describe how this will be accomplished in each county.

CAPSBC regularly participates in community events sponsored by a multitude of partners, including Food Drives, Health Fairs, and Job Fairs. In addition, CAPSBC maintains membership in several non-profit membership organizations and regularly presents information on services and activities for the benefit of qualifying residents of the county.

Identify the main Action Steps required to achieve the goals above utilizing specifics such as timelines, contact people, etc.,.

CAPSBC will make announcements or presentations and pass out literature at the following venues:

Non-Profit Executives Network – Second Wednesday of each month – Lowell King
High Desert Resource Network – Third Thursday of each month – Vici Nagel
211 Network – Continuous update of services – Gary Madden

Detail progress made in this arena with respect to actual, tangible achievements. Be specific with regards to dates, details, and participants.

Outreach workers are in the community daily to seek out and qualify residents for the program. In addition, CAPSBC will utilize the Food Bank Distribution network to issue monthly reminders of program availability.

Quality Assurance

For each question in this section, provide a comprehensive narrative on your current processes and what changes you will make to increase the oversight of program staff and subcontractors to ensure that:

Only eligible households are served and that priority will be given to vulnerable populations and those with high energy burden per DOE regulations.

Guidelines for the DOE Program will be reviewed with all Outreach Specialists to ensure only eligible clients are signed up. CAPSBC will search for households with the lowest incomes and highest energy burdens from HEAP and Fast Track referrals and from our lists of California Alternate Rates for Energy ("CARE") clients. We will further search out these clients by mass distributions of flyers into areas where a concentrated number of low-income and vulnerable households reside. The CAPSBC Food Bank distribution network of 178 food pantries connects to over 10,000 low-income households countywide each month, and CAPSBC will partner with the Transitional Assistance Department to mail flyers to TANF recipients to advertise and promote the program.

Each DOE file will be reviewed by CAPSBC staff to ensure compliance with DOE guidelines for servicing our targeted population before final processing begins.

Only feasible measures are installed, all measures billed to CSD were installed, and workmanship meets CSD standards.

CAPSBC Quality Control Technicians will continue to inspect all units where weatherization work was done to ensure all measures were installed and they meet both CSD standards (currently under development) and the high standards to which the Agency strives.

All records meet CSD standards, billing is accurate and truthful, and reports are submitted on time.

Weatherization Field Supervisors as well as clerical staff will be instructed on the importance of accountability on aspects of this program. Management will meet with all staff and review all the current and future procedures, guidelines, deadlines and tracking mechanisms we currently have in place to ensure compliance in all areas of the Contract. The CAPSBC Weatherization Program will work closely with the Fiscal Department to monitor the status of reports and ensure they receive accurate billing in a timely manner.

Communications between all CAPSBC Departments involved or associated with ARRA Program will be a primary concern and all will be kept updated on our status in relationship to our progress and goals.

CAPSBC uses Microsoft Dynamics® enterprise accounting software to maintain accurate, real-time financial statements that can be customized for the reporting requirement of ARRA. CAPSBC proudly maintains a track record of timely report submissions to CSD and other funding sources.

Describe in detail the applicable Action Items that will need to be addressed in order to achieve compliance in the above three areas. Specify how these action items will be achieved through the concepts of who is responsible, how and when the actions will occur, and why the action is important.

The Outreach Specialist Supervisor will check and monitor all applications signed up by Outreach Specialists to ensure compliance.

The most experienced and qualified Quality Control Technicians will be assigned to inspect 100% of the units weatherized as required by ARRA. They will report to their Supervisor any issues that don't comply with the ARRA installation procedures or measures that haven't been installed. The Weatherization Supervisor will see the corrections are made and take actions to ensure the issue doesn't occur again. They will also provide written reports of to the Program Manager on the quality of work being perform by each crew member assigned to the ARRA Program.

All files will be review by the Weatherization Supervisors to ensure the records and forms are correctly filled and meet all ARRA requirements. They will make sure the files are processed in a timely manner so all reporting guidelines are met. The Program Supervisor will monitor all these activities and report to the Program Manager immediately any issues in these areas, so the can be quickly resolved.

Workforce Development

Enter the total number of in-house employees currently working in CSD weatherization and HCS programs in the following positions. Count each employee only once. If only a portion of an employee's time is charged to the program, count that person as one.

Position	Total
Admin / Fiscal	6
Program Management	2
Program Support	4
Intake	0
Outreach	13
Other -	-

Enter the total number of subcontracted employees currently working in CSD weatherization and HCS programs in the following positions. Count each subcontracted employee only once. If only a portion of an employee's time is charged to the program, count that person as one.

Position	Total
Admin / Fiscal	
Program Management	
Program Support	
Intake	
Outreach	
Other -	

Describe your plans for building up your in-house workforce to meet the capacity needed to perform the ARRA program.

The Weatherization Training Center is the key to in-house capacity building to perform the ARRA program. The Training Center has been approved as an Eligible Training Provider List of the State of California Employment Development

Department.

Describe how you will develop partnerships with local workforce investment advocates in order to achieve the objectives outlined above.

CAPSBC is establishing partnerships with several local workforce investment advocates, including the City of San Bernardino Employment and Training Agency ("SBETA"), the County of San Bernardino Workforce Development Department ("WDD"), San Bernardino Community College District ("SBCCD") and the Center for Employment Training ("CET"). The goal of each partnership is to identify, train and certify local unemployed citizens to do weatherization work. Workers referred from SBETA, WDD, SBCCD and CET will be subject to a 20 to 24-week training program, covering three subject areas: 1) Basic Weatherization, 2) Blower Door and Duct Blaster, and 3) Combustion Appliance Safety. Each module will consist of two weeks of classroom training followed by four to six weeks of field work paired with an experienced Crew Leader. At the end of the training period, the most promising trainees will be offered a position contingent on normal CAPSBC hiring policies, including a background check and drug screen.

Provide a timeline that corresponds to the above workforce development plan.

Tentative Timeline:

10/1/09 – Secure Eligible Training Partner status from WIB;
12/1/09 – Launch OJT Training program with SBETA, WDD, SBCCD, CET.
12/1/09 – Trainees begin Basic Weatherization Training.
12/15/09 – Trainees begin field work in Basic Weatherization
2/1/10 – Trainees begin Blower Door/Duct Blaster Training
2/15/10 – Trainees begin field work in Blower Door/Duct Blaster
4/1/10 – Trainees begin Combustion Appliance Safety Training
4/15/10 – Trainees begin field work in Combustion Appliance Safety

Describe your plans for building up your workforce by outsourcing to meet the capacity needed to perform the ARRA program.

CASPBC will analyze all contracts and determine the number of units that need to be completed to achieve agency goals. Then we will supplement the current workforce internally in all required areas to achieve these goals, monitor the progress and make changes as necessary. Outsourcing is not planned.

Describe your action plan for outsourcing, including a description of the RFQ/bidding process, how interested parties will be informed of this opportunity, and provide a timeline for aligning subcontractors to provide timely delivery of services. Also describe your action plan for oversight of subcontractors.

CAPSBC has no plans to outsource any of our workforce requirements.

If you are not outsourcing any of your workforces, explain why.

CAPSBC has continuously been able to achieve increasing production goals under its growing workload by expanding when necessary. This has allowed the agency to achieve these goals while being able to ensure the quality of service and workmanship are up to the high standards all funding sources require and expect. CAPSBC has sub-contracted work in the past, and determined that doing all work in-house allows us total control over all aspects of the work, including completion time, quality of the work and the convenience of a single point-of-contact for the client to obtain information on the status of their file. This is also more efficient for clerical and fiscal staff when it comes to completing

administrative and billing tasks. They have easy access to supervisors and crews get answers on any questions they may have related to the work completed.

Other Subcontracting

Describe your plans for procuring of material goods and services from third parties, how the agency plans to inform interested parties within the local community of subcontracting opportunities, and your action plan for oversight of subcontractors.

CAPSBC will procure material goods and services according to the agency policy of three (3) quotes for all purchases in excess of \$500. For purchases in excess of \$5,000, three (3) quotes will be obtained, with the additional step of obtaining CSD approval prior to purchase. CAPSBC maintains a list of vendors for each product purchased, and also has access to the County of San Bernardino Purchasing Department preferred vendor list.

Vehicle & Equipment over \$5,000 per Unit

If you are planning on charging any portion of vehicle and equipment purchases to ARRA, enter the following information related to these purchases. This will require DOE approval.

Item	Quantity	Est. Cost
Cargo Vans	5	144,920
Box Trucks	2	76,262
Crew Cab Pick-up Trucks	6	118,382
Utility Beds with Lift	2	76,262

Barriers

Identify any barriers that you feel you may face in meeting the requirements of ARRA (subcontracting, workforce development, outreach & marketing, quality assurance and oversight, compliance with DOE requirements, fiscal requirements and reporting, performance).

- The Davis-Bacon Prevailing Wage determination will impact CAPSBC's payroll and salary structure.

Describe what assistance you will need from CSD.

None

Attached Document Checklist

Document	Attached?
Ramp Up Schedule	✓
Field Staff Training Logs for Agency Staff & Subcontractors	✓
Diagnostic Equipment Log	✓
Disclosure of Findings	✓
Disclosure of Legal Proceedings	✓

Comments

Enter any comments you wish to make relative to the Local Plan and

ARRA.

None

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DOE ARRA PRIORITY PLAN NARRATIVE

Outreach

Describe in narrative format the selection process for dwellings to be weatherized and the outreach methods to be utilized to assure that eligible households are made aware of the services through DOE ARRA or any similar energy-related assistance program.

By expanding the Outreach Staff for this program, and increasing marketing efforts in targeted low income areas by networking with community- and faith-based organizations, CAPSBC will promote "the Greening of San Bernardino County" in community newspapers, on local radio and cable TV, in community grocery stores and other places people congregate.

CAPSBC has an alliance with County of San Bernardino Transitional Assistance Department and Preschool Services Department to mail flyers to their client base on behalf of the CAPSBC Weatherization Assistance Program. The flyers include a tear-off form that interested parties may return to the agency to arrange an appointment with a CAPSBC Outreach Worker, who can qualify a home for weatherization and refer the home to a Scheduler.

Reweathering on

Describe in narrative format your selection process to ensure compliance with the DOE ARRA Reweathering Policy when providing services to dwellings previously weatherized from September 30, 1994 and earlier.

Because CAPSBC is the sole Weatherization Contractor for San Bernardino County and maintains a database of all homes weatherized since the inception of the program, every prospective home will be compared to the database to determine if it has been weatherized by CAPSBC previously, and if so, the date of service. Homes weatherized prior to September 30, 1994 will be included in the set of homes to be weatherized and scheduled according to standard agency practices. Homes weatherized after the target date will be evaluated under other CAPSBC contracts to determine if the home qualifies for other services, such as refrigerator replacement.

Client Education

Describe in narrative format a description of how your client education services will be provided to include needs assessments, budget education/counseling, energy conservation and weatherization measures education. Describe how your activities are designed to target households that have not been previously serviced under a LIHEAP or DOE Weatherization program.

CAPSBC conducts a minimum of twelve (12) client education workshops each week at CAPSBC Headquarters, and several workshops per month at other locations in the county to minimize the transportation burden for clients living in distant locations. Workshop topics include energy conservation education, weatherization measures education and household budgeting.

Training and Technical Assistance

Describe in narrative format a description of how you will provide Training and Technical Assistance to your administrative and program staff.

In order to train internal administrative and program staff, CAPSBC regularly participates in webinars and conference calls focused on specific subject matter, hosted by CSD, DOE, IRS and other agencies. To date, training topics have included Accounting for ARRA funds, Davis-Bacon payroll accounting and Program Reporting. Staff members trained includes the CEO, Deputy Director, Fiscal Director, Program Manager and other key fiscal and program staff. In addition, CAPSBC's Board of Directors will receive training on ARRA at the December 10,

Leveraging

Describe in narrative format how you will leverage DOE ARRA funds with other available program funds and how much leveraging you plan on coordinating.

Because of the need to segregate DOE ARRA expenditures from other sources of funding, CAPSBC does not intend to leverage DOE ARRA funds. Instead, as Outreach Workers identify homes with potential to qualify under separate, non-DOE ARRA contracts, those homes will be assigned to non-DOE ARRA crews.

RAMP UP SCHEDULE

Agency: CAP San Bernardino County

		2009			2010			2011			
Total Expenditures by County		Total	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30
Total		40	0	40	0	0	0	0	0	0	0
Job Creation - Subcontractors		Total	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30
Basic Weatherization		0									
Specialty		0									
Other -		0									
Other -		0									
Total		0	0	0	0	0	0	0	0	0	0
Vehicle & Equipment Purchases		Total	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30
Vehicles		15		15							
Equipment - CO2 Analyzers		5		5							
Equipment - Blower Doors		7		7							
Equipment - Duct Blasters		9		9							
Equipment -		0									
Total		36	0	36	0	0	0	0	0	0	0

Instructions

Expenditures by County -

- Enter the name of each county in your service territory on separate lines.
- For each county, enter the percentage of funds you plan to expend by the end of each quarter.

Unit Production By County -

- Enter the name of each county in your service territory on separate lines.
- For each county, enter the number of units you plan to complete by the end of each quarter.

Job Creations - Agency -

- Enter the number of employees by category that you estimate will be hired each quarter.
- Categories - If a new hire fits into more than one category, count the person only once. Place them in the category that requires the most training per the proposed training coursework in the instructions.

Job Creations - Subcontractors

- Enter the estimated number of jobs that will be created by contracting with subcontractors for both basic wx and specialty work.
- To help determine the number of jobs, base your estimate as if you were doing a direct hire rather than subcontracting.

Vehicle & Equipment Purchases over \$5,000 per Unit

- Enter the quantity of vehicles and equipment in the quarter you are planning to make the purchases even if only a portion of the purchase will be charged to ARRA.

Note: Although this sheet is protected, there is no password. To remove the protection, go to Tools, choose Protection and lastly choose Unprotect Sheet.

FIELD STAFF TRAINING LOG

Agency Name: CAP San Bernardino County Subcontractor Name:

Employee Name	Hire Date	Training Date	Basic Wx	CAS	Blower Door	Duct Blaster	Environ Hazard	Lead Safe Wx	HUD Lead-Safe Wx	Performs Unit Assessments?
Field Supervision										
MICHELLE JACKSON	09/13/99	Training Date	01/01/98	X	01/01/01	X	X	X	X	
		Provider	Other		STC					
MARCO CABRERA	07/25/01	Training Date	01/01/83	X	X	12/05/05	X	02/01/04	X	
		Provider	Other			Other		In-house		
ALVIN HARRIS	04/13/09	Training Date	X	X	07/13/09	07/13/09	X	X	X	
		Provider			SB	SB				
Assessors/Inspectors										
SAMUEL MEJIA	12/19/88	Training Date	01/01/89	08/17/09	08/10/09	12/06/08	01/01/90	X	X	X
		Provider	Other	SB	SB	Other	Other			
LARRY ARMSTRONG	12/10/07	Training Date	04/21/08	05/05/08	X	X	05/05/08	X	X	X
		Provider	STC	STC			STC			
GARY FOSTER	10/02/96	Training Date	10/01/96	03/09/09	02/23/09	02/24/09	06/03/04	01/01/00	X	
		Provider	Other	SB	SB	SB	Other	Other		X
LAURANCE BEAUCHMIN	04/06/09	Training Date	04/06/09	05/04/09	07/13/09	X	X	X	X	
		Provider	SB	SB	SB					
Crew Leaders (Journeymen)										
ALFREDO VEGA	05/14/90	Training Date	01/01/88	02/01/94	02/01/94	12/01/05	06/04/08	01/01/00	X	
		Provider	Other	Other	Other	Other	Other	Other		
MANUEL FLORES	04/14/97	Training Date	08/08/08	01/01/85	01/01/85	12/05/05	06/03/04	02/01/04	X	
		Provider	SB	Other	Other	Other	In-house	In-house		
MIKE LANDEROS	07/28/97	Training Date	01/01/83	05/04/01	05/04/01	01/01/05	06/03/04	02/01/04	X	
		Provider	Other	STC	STC	Other	In-house	In-house		
SANTIAGO PERAZA	07/02/01	Training Date	X	X	X	12/05/05	06/03/04	02/01/04	X	
		Provider				Other	In-house	In-house		
WILLIE PEREZ	05/14/98	Training Date	01/01/98	02/01/04	01/01/99	05/01/05	06/03/04	01/01/02	X	
		Provider		Other	STC	Other	In-house	In-house		
JAMIE RIOS	08/06/01	Training Date	11/01/97	08/19/04	08/19/04	12/06/05	X	08/01/02	X	

Employee Name	Hire Date	Provider	Basic Wx	GAS	Blower Door	Duct Blaster	Environ Hazard	Lead-Safe Wx	HUD Lead-Safe Wx	Performs Unit Assessments?
JOSE VARGAS	10/09/02	Training Date	Other	Other	Other	Other	X	In-house	X	
		Provider	Other	Other	Other	Other		In-house		
CRAIG NORWOOD	07/24/06	Training Date	STC	STC	STC	STC	X	In-house	X	
		Provider	Other	Other	Other	Other		In-house		
LAMAR FAUST	08/06/01	Training Date	Other	Other	Other	Other	X	In-house	X	
		Provider	Other	Other	Other	Other		In-house		
JEFF BERNADEZ	11/20/06	Training Date	SB	SB	SB	SB	X	X	X	
		Provider	Other	Other	Other	Other				
TRACY BROWN	10/02/96	Training Date	Other	STC	STC	STC	STC	In-house	X	
		Provider	Other	Other	Other	Other				
CARLOS HERRERA	11/13/06	Training Date	SB	SB	SB	SB	X	X	X	
		Provider	Other	Other	Other	Other				
ANTONIO VIRAMONTES	11/13/06	Training Date	Other	STC	STC	STC	STC	X	X	
		Provider	Other	Other	Other	Other				
Crew Members (Apprentices)										
OMAR ECHAUREGUI	05/21/01	Training Date	Other	X	SB	Other	X	In-house	X	
		Provider	Other	Other	Other	Other				
MARCOS SILVA	01/07/08	Training Date	SB	SB	SB	SB	X	Other	X	
		Provider	Other	Other	Other	Other				
NATIVIDAD PRIETO	01/09/06	Training Date	SB	SB	SB	SB	X	Other	X	
		Provider	Other	Other	Other	Other				
JOE APADOCA	02/05/07	Training Date	STC	X	SB	SB	X	X	X	
		Provider	Other	Other	Other	Other				
TODD SMITH	01/08/07	Training Date	SB	X	SB	X	X	Other	X	
		Provider	Other	Other	Other	Other				
MIKE HORNER	04/07/08	Training Date	SB	X	X	X	X	Other	X	
		Provider	Other	Other	Other	Other				
DAVID BURLAR	09/17/07	Training Date	Other	X	X	X	X	Other	X	
		Provider	Other	Other	Other	Other				

Employee Name	Hire Date	Training Date	Basic Wx	CAS	Blower Door	Duct Blaster	Environ Hazard	Lead Safe Wx	HUD Lead-Safe Wx	Performs Unit Assessments ?
LARRY CERVANTES	02/05/07	Training Date	08/08/08	08/17/09	06/08/09	06/08/09	X	X	X	
		Provider	SB	SB	SB	SB				
ED SMITH	06/09/09	Training Date	08/08/08	X	08/10/09	X	X	X	X	
		Provider	SB		SB					
JESUS COSTILLA	08/04/08	Training Date	11/21/08	X	X	X	X	X	X	
		Provider	SB							
EUGENE ALEXANDER	12/15/08	Training Date	12/19/08	08/17/09	06/08/09	06/08/09	X	X	X	
		Provider	SB	SB	SB					
ANDREW PEREZ	01/09/06	Training Date	02/02/09	03/09/09	X	X	X	X	X	
		Provider	SB	SB						
DENNIS COLLIER	01/17/09	Training Date	X	X	06/08/09	X	X	X	X	
		Provider			SB					
CHRISTINO SAMPERIO	07/06/09	Training Date	X	08/17/09	08/10/09	X	X	X	X	
		Provider		SB	SB					
KEVIN STRICKLAND	06/16/05	Training Date	X	08/17/09	X	X	X	X	X	
		Provider		SB						
JOSE GONZALES	07/27/19	Training Date	09/04/09	X	X	X	X	X	X	
		Provider	SB							
DEVIN SANTIAGO	07/06/09	Training Date	09/04/09	X	X	X	X	X	X	
		Provider	SB							
SHANNON WEATHERTON	8/31/019	Training Date	09/04/09	X	X	X	X	X	X	
		Provider	SB							
KEVIN JOHNSON	09/29/09	Training Date	X	X	X	X	X	X	X	
		Provider								

Instructions

Complete this form for your agency and include all current weatherization and HCS employees who work on CSD programs.

Complete a separate form for each subcontractor who currently performs basic weatherization services for your agency. Do not complete a form for subcontractors who are CSD service providers.

Categorize employees by their primary job function.

Employee Name	Hire Date	Basic Wx	CAS	Blower Door	Duct Blaster	Environ Hazard	Lead-Safe Wx	HUD Lead-Safe Wx	Performs Unit Assessments?
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Provider key -

- Please use one of the following choices when entering a provider.

Use	For
STC	PG&E Energy Training Center in Stockton
SB	San Bernardino Energy Training Center
In-house	Provided at the agency by another agency employee
Onsite	Onsite training provided by RHA
Other	Any other type of provider not listed

Performs Unit Assessments? -

- Place an X by any employee who performs assessments you consider to be the primary assessment of the dwelling.

Note: Add more lines when necessary. The form is protected without a password. To remove the protection, go to Tools, choose Protection and lastly choose Unprotect Sheet.

DIAGNOSTIC EQUIPMENT LOG

Agency: CAP San Bernardino County
 Subcontractor: N/A

Make / Model	Probe Extension Present?	Analyzer Acquisition Date	Analyzer General Condition	Date Analyzer Last Sent to Manufacturer?
CO Analyzers				
19-7047	Yes		Good	12/23/2008
24-7270	Yes		Good	12/23/2008
19-7047	Yes		Good	12/23/2008
24-7270	Yes		Good	12/23/2008
19-7047	Yes		Good	12/19/2008
24-7270	Yes		Good	12/23/2008
24-7270	Yes		Good	12/23/2008
19-7047	Yes		Good	12/23/2008
19-7047	Yes		Good	12/23/2008
19-7047	Yes		Good	12/23/2008
19-7047	Yes		Good	11/20/2008
24-7270	Yes		Good	12/23/2008
19-7047	Yes		Good	12/17/2008
19-7047	Yes		Good	12/23/2008
24-7270	Yes		Not in Use	
19-7047	Yes		Not in Use	
24-7270	Yes		Good	12/23/2008
19-7047	Yes		Good	12/23/2008
19-7047	Yes		Good	12/23/2008
19-7047	Yes		Not in Use	
24-7270	Yes		Good	12/23/2008
24-7270	Yes		Good	12/23/2008
19-7034	Yes		Not in Use	11/19/1998
19-7047	Yes		Not in Use	
19-8004	Yes		Not in Use	

19-7047	Yes	Not in Use	
19-7034	Yes	Not in Use	
19-7047	Yes	Damaged	
24-7270	Yes	Not in Use	
19-7047	Yes	Not in Use	
19-7034	Yes	Damaged	
19-7034	Yes	Not in Use	REPAIRED 11/23/98
24-7270	Yes	Not in Use	
19-7034	Yes	Not in Use	
19-7034	Yes	Damaged	
19-7034	Yes	Damaged	
24-7270	Yes	Damaged	
19-7047	Yes	Not in Use	
19-7047	Yes	Not in Use	
19-7047	Yes	New	New Issue 3/5/09

How many additional CO analyzers will you be purchasing for ARRA? 5

Blower Make / Model Number / Color	Acquisition Date (or date updated whichever is later) of Blower Door (excluding gauge)	General Condition of Blower/Frame/ Panel/Controller	Gauge Make / Model / Type	Acquisition Date of Gauge	Date Gauge Last Sent to Manufacturer?
Blower Doors					
Minneapolis Blower Door		Good	DG700		Internal Calibration
Minneapolis Blower Door		Good	DG700		Internal Calibration
Minneapolis Blower Door		Good	DG700		Internal Calibration
Minneapolis Blower Door		Good	DG700		Internal Calibration
Minneapolis Blower Door		Good	DG700		Internal Calibration
Minneapolis Blower Door		Good	DG700		Internal Calibration
Minneapolis Blower Door		Good	DG700		Internal Calibration
Minneapolis Blower Door		Good	Analog		Internal Calibration
Minneapolis Blower Door		Good	Analog		Internal Calibration
Minneapolis Blower Door		Good	Analog		Internal Calibration

Minneapolis Blower Door		Good	Analog		Internal Calibration
Minneapolis Blower Door		Good	Analog		Internal Calibration
Minneapolis Blower Door		Good	Analog		Internal Calibration
Minneapolis Blower Door		Good	Analog		Internal Calibration
How many additional blower doors will you be purchasing for ARRA?					
7					
Blower Make / Model Number / Color	Acquisition Date (or date updated whichever is later) of Duct Blaster (excluding manual)	General Condition of Duct Blaster (excluding gauge)	Gauge Make / Model / Type	Acquisition Date of Gauge	Date Gauge Last Sent to Manufacturer?
Duct Blasters					
Duct Blaster		Good	DG700		Internal Calibration
Duct Blaster		Good	DG700		Internal Calibration
Duct Blaster		Good	DG700		Internal Calibration
Duct Blaster		Good	DG700		Internal Calibration
Duct Blaster		Good	DG700		Internal Calibration
Duct Blaster		Good	DG700		Internal Calibration
Duct Blaster		Good	DG700		Internal Calibration
Duct Blaster		Good	DG700		Internal Calibration
Duct Blaster		Good	DG700		Internal Calibration
Duct Blaster		Good	DG700		Internal Calibration
Duct Blaster		Good	DG700		Internal Calibration
Duct Blaster		Good	DG700		Internal Calibration
Duct Blaster		Good	DG700		Internal Calibration
Duct Blaster		Good	DG700		Internal Calibration
Duct Blaster		Good	DG700		Internal Calibration
Duct Blaster		Good	DG3		Internal Calibration
Duct Blaster		Good	Analog		Internal Calibration
How many additional Duct Blasters will you be purchasing for ARRA?					
9					

Instructions

Complete this form for your agency including all equipment you have whether or not you are currently using it in the field. Complete a separate form for each subcontractor who performs basic weatherization services for your agency. This does not include subcontractors who are CSD service providers.

Acquisition Dates -

- If you do not have the acquisition date, please provide an approximate year that you purchased the equipment.

CO Analyzers -

- Last Calibration by Whom? - If the equipment was calibrated by an employee in-house using a kit, enter "In-House". If it was sent out to the manufacturer for calibration, enter "Manuf".

- Date Last Sent to Manufacturer - Enter the date that the equipment was last sent to the manufacturer for calibration, repair or any other reason. If you have not sent the equipment to the manufacturer since you acquired it, enter "N/A".

Blower Doors & Duct Blasters -

- Date Gauge Last Sent to Manufacturer? - Enter the date that the gauge was last sent to the manufacturer for any reason. If you have not sent the equipment to the manufacturer since you acquired it, enter "N/A".

Future Purchases -

- Be certain to answer this question after each type of equipment. This will help CSD in negotiating some bulk purchase rates.

Note: Add more lines when necessary. The form is protected without a password. To remove the protection, go to Tools, choose Protection and lastly choose Unprotect Sheet.

RAMP UP SCHEDULE

Agency: CAP San Bernardino County

		2009			2010			2011		
Total Expenditures by County		7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30
Total	40	0	40	0	0	0	0	0	0	0
Job Creation - Subcontractors	Total	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30
Basic Weatherization	0									
Specialty	0									
Other -	0									
Other -	0									
Total	0	0	0	0	0	0	0	0	0	0
Vehicle & Equipment Purchases	Total	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30	10/1 - 12/31	1/1 - 3/31	4/1 - 6/30	7/1 - 9/30
Vehicles	15		15							
Equipment - CO2 Analyzers	5									
Equipment - Blower Doors	7									
Equipment - Duct Blasters	9									
Equipment -	0									
Total	36	0	36	0	0	0	0	0	0	0

Instructions

- Expenditures by County -
- Enter the name of each county in your service territory on separate lines.
 - For each county, enter the percentage of funds you plan to expend by the end of each quarter.
- Unit Production By County -
- Enter the name of each county in your service territory on separate lines.
 - For each county, enter the number of units you plan to complete by the end of each quarter.
- Job Creations - Agency -
- Enter the number of employees by category that you estimate will be hired each quarter.
 - Categories - If a new hire fits into more than one category, count the person only once. Place them in the category that requires the most training per the proposed training coursework in the instructions.
- Job Creations - Subcontractors
- Enter the estimated number of jobs that will be created by contracting with subcontractors for both basic wx and specialty work.
 - To help determine the number of jobs, base your estimate as if you were doing a direct hire rather than subcontracting.
- Vehicle & Equipment Purchases over \$5,000 per Unit
- Enter the quantity of vehicles and equipment in the quarter you are planning to make the purchases even if only a portion of the purchase will be charged to ARRA.

Note: Although this sheet is protected, there is no password. To remove the protection, go to Tools, choose Protection and lastly choose Unprotect Sheet.

DOE ARRA Amended Local Plan – Addendum 1

Instructions If you need additional funding for intake, outreach and/or client education, you must provide justification for the increased need. If you do not need any additional funding, enter zero under the first question for each expense line item below.

**Additional
Intake
Justification**

Intake is currently limited to 2% of your total contract. How much additional funding will you need to support expanded or different approaches for carrying out intake services? (Enter dollar amount)

If you are requesting additional funds, describe the differences in strategy and design for delivering intake as compared to what you proportionately spend in a normal year.

0

**Additional
Outreach
Justification**

Outreach is currently limited to 5% of your total contract. How much additional funding will you need to support expanded or different approaches for carrying out outreach services? (Enter dollar amount)

If you are requesting additional funds, describe the differences in strategy and design for delivering outreach as compared to what you proportionately spend in a normal year.

We requesting to increase our percentage of Outreach from 5% to 7% so we can add an additional Three (3) Outreach Specialist to bring our total of Outreach Specialists to six (6) to insure we are able to reach are production goals. We will do this by reducing the amount we budgeted for Worker's Compensation by \$98,295.00 and Training and Technical Assistance by \$7131.00 and adding these amounts which total \$105,426.00 to our Outreach Budget.. We are able to do this because we over budgeted by this total in both of these areas.

**Additional
Client
Education
Justification**

Client Education is currently limited to 5% of your total contract. How much additional funding will you need to support expanded or different approaches for carrying out intake services? (Enter dollar amount)

If you are requesting additional funds, describe the differences in strategy and design for delivering client education as compared to what you proportionately spend in a normal year.

0